Deliverable 77.5.3
Enterprise Customer Service Delivery Model (CSDM) – Target State Definition:

Task Order Summary:

The Consistent Answers Definition and Preliminary Design initiative was approved by Investment Review Board on April 5, 2001. During this initiative, the Consistent Answers team conducted extensive discovery and evaluation of the current environment, created a target state customer service environment, and developed a business case and sequencing plan to transform SFA customer service. The Enterprise Customer Service Delivery Model – Target State Definition deliverable presents the target state for the SFA customer service environment.

SFA's customers and delivery partners are serviced by DC, regional offices, and eleven major contact centers. Each customer service area has unique phone numbers, email addresses, contact history databases, and contract parameters for cost and performance metrics. Most of the customer service areas operate largely independently of one another and employ individual strategies, processes, and technologies to deliver customer service.

The current customer service environment makes it difficult for customers and delivery partners to interact with SFA. The segmented information makes it time consuming for customer service representatives and SFA employees to access and understand a customer and/or delivery partner's complete experience with SFA. The current customer service environment does not optimize SFA's ability to serve customers and delivery partners and the silos of information contribute to excess costs through duplicated work and misdirected inquiries.

The Consistent Answers team leveraged the work and findings from completed and current projects including the Call Center IPT, the implementation of the new Ombudsman Case Tracking System, the Schools CRM Storyboard project, the School's Institutional Data View project, eServicing, and the Financial Partners Square One initiative.

The information for this deliverable was compiled from an analysis of the "As Is" Customer Service Delivery Model (CSDM). This deliverable presents the desired "To Be" state for servicing students, schools, and financial partners at SFA that will:
• Streamline and standardize customer service contracts
• Manage customer phone and email interactions at the enterprise level through a central IVR
• Provide a SFA enterprise 800 number and email address per customer base
• Provide one customer service application to view and update customer and delivery partner information and contact history, interface to an enterprise knowledge repository, and increase enterprise communication through message broadcasting and workflow

Student Financial Assistance

Deliverable 77.5.3
Enterprise Customer Service Delivery Model – Target State Definition:

<u>**Deliverable Summary:**</u>

The information for deliverable 77.5.3 was developed between September – December 2001.

The objective of the Target State Definition Deliverable:
- Define the target state CSDM
- Define the technology and telephony architecture as SFA's Customer Interaction Centers (CIC)
- Simulate the target state CSDM
- Develop high level workplan

Milestones completed during September – December:
- Preliminary target state CSDM design
- "To Be" technology and telephony operating models
- High level requirements
- High level workplan

Table of Contents

Section Title	CA Team	Summary
CSDM	All	Overall "To Be" model of the current systems, processes, and customer service interaction points for SFA.
Customer Lifecycle	Process Design / Customer View	Overall target state experience for customers and delivery partners relationship with SFA including a description of customer needs and required capabilities for each customer segment.
CIC Operating Models	Process Design	Overall "To Be" customer service capabilities.
SFA Operating Models	Customer View	High level overall "To Be" customer service capabilities.
High Level Requirements	Customer View	High level requirements for Consistent Answers stages 3-5.
Technology Blueprint	Tech Arch	Overview of the Technology target state, including infrastructure, interface integration, and data architecture built-out by stage, and including other modernization dependencies.
Telephony Design and Architecture	Central IVR	Overview of future SFA capabilities delivered for the SFA channels outlining the proposed architecture, and conceptual designs for the Students and Delivery Partner IVRs.
Simulation Results	Simulation	Simulation of target state customer service delivery and associated costs to validate proposed process improvements and the financial model.
High Level Workplan	All	Overall high level tasks to be completed in each upcoming stage of the Consistent Answers effort.